

Curriculum Vitae

Larry H. Peterson, MS, RSP, CFP®

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Education

- Master of Science in Personal Financial Planning, Texas Tech University, 2008 – Summa Cum Laude (GPA 3.96)
- Bachelor of Arts in Finance & Personal Financial Planning, Utah State University, 2006 – Cum Laude (GPA 3.56)
- Associate of Science in Business Administration, Snow College, 2004

Certifications

- Certified Financial Planner™ (CFP®), 2010
- Registered Settlement Planner (RSP), 2017

Professional Experience

Adjunct Professor – Utah Valley University

August 2025 – Present

- Teach Personal Finance and Financial Planning courses to undergraduate students.
- Develop course materials and provide mentorship to students interested in financial planning careers.

Director, Financial Planner – Amicus Financial Advisors, LLC, Lehi, UT

January 2008 – Present

- Advise high-net-worth and mass affluent clients on comprehensive financial planning, tax minimization, and investment strategies.
- Coordinate trusts, including special needs, revocable, irrevocable, and court-ordered trusts.

Managing Member & Settlement Planner – Amicus Settlement Planners, LLC, Lehi, UT

March 2013 – June 2024

- Prepared settlement-focused financial plans and implemented tailored strategies for clients.
- Analyzed life care plans to model required funding for client needs.

Publications & Presentations

- “Self Reliance” – Thanksgiving Meadows 2nd Ward, June 2024

- Greg Maxwell, Joseph Tombs, and Larry Peterson, “How Personal Injury Attorneys Can Benefit from the Tax Cuts and Jobs Act,” Utah Trial Journal, Spring 2019
- Larry Peterson & Cameron Bowen, “Using MoneyGuidePro in Settlement Planning,” Society of Settlement Planning Annual Conference, 2017

Professional & Volunteer Organizations

- Guest Presenter, Utah Valley University – Wealth Management & Intro to Financial Planning (2016 – present)
- Lehi CERT (Community Emergency Response Team) member (2025 - present)
- Board Member, Financial Planning Association – Chair of annual symposium committee (2011 – 2013)
- Scoutmaster, Boy Scouts of America – Troop #1056 (2013 – 2019)